

Indian Indices	Oct 3	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81207	0.28	-2.44	-1.56	22.46
Nifty 50	24894	0.23	-2.01	-1.41	22.01
BSE Mid cap	45678	0.78	-2.21	-5.55	32.46
Nifty Midcap	57503	0.83	-3.65	-3.65	33.26
Nifty Smallcap	17878	0.69	-6.04	-6.04	30.87
BSE SmallCap	53375	1.09	-2.49	-5.36	32.43

Source: BSE, NSE

Indian Indices	Oct 3	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	59712	0.03	11.19	0.47
BSE Bankex	62741	0.54	-1.02	6.77
BSE CD	58649	1.15	-3.92	-12.15
BSE CG	69458	1.02	-3.70	-1.83
BSE FMCG	20299	0.24	0.91	-13.26
BSE Healthcare	43524	-0.09	-2.43	-0.56
BSE IT	33548	0.26	-11.86	-20.48
BSE Metal	34049	1.85	6.40	-1.12
BSE Oil & Gas	27094	0.55	-3.25	-12.07
BSE Power	6809	0.66	-0.42	-19.42
BSE Realty	6809	-0.09	-8.91	-16.84

Source: BSE, NSE

Global Indices	Oct 3	1D % Chg	3M % Chg	1Y % Chg
DJIA				
Nasdaq				
FTSE 100				
Nikkei 225	45770	1.85	15.04	18.72
Hang Seng	27141	-0.54	12.76	22.73

Source: Financial websites

Rs. Cr (Equity)	FII Inv Oct 1	MF Inv Sep 29	DII Inv Oct 3
Buy	14431	33998	13449
Sell	14247	30778	12920
Net	184	3220	528
Net (YTD)	-153010	397769	562557

Source: NSDL, NSE

Debt Market Indicators	Oct 3	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	5.45%	5.00%
10 Yr Gilt^	6.51%	6.52%
91-day T-bill^	5.43%	5.44%
182-day T Bill^	5.55%	5.54%
364-day T Bill^	5.55%	5.54%
3-mth CP rate	6.53%	6.40%
6-mth CP rate	6.70%	6.70%
1-yr CP rate	6.90%	6.90%
3-mth CD rate	5.85%	5.75%
6-mth CD rate	6.18%	6.20%
12-mth CD rate	6.35%	6.40%
5 yr Corp Bond	6.95%	7.00%
Net LAF o/s (Rs Cr)*	-187917	-90246
M3 supply (Rs lakh Cr)**	283.49	284.77
G-sec Volume (Rs Cr)	60905	107155
SDF*	195287	175443
1 Year OIS	5.70%	5.44%
US 10-year Treasury Yield	4.13%	4.10%

\*Data with 1-day lag (includes fixed and variable repo & reverse repos) ^Weighted average yield

\*\*Sep 19 and Sep 5 respectively

## Indian Equity

- Indian equity benchmarks closed higher on Friday, boosted by gains in metal and banking stocks driven by Fed rate cut hopes and a weaker dollar index.
- The top gainers were Tata Steel, Power Grid Corporation, Hindalco, Axis Bank and Kotak Mahindra—up 1.80-3.40%.
- The top losers were Max Healthcare, Coal India, Eicher Motors, Tech Mahindra and Maruti Suzuki—down 1.00-3.95%.

## Global Equity

- Wall Street stocks ended mixed on Friday with Nasdaq ending higher amid optimism around artificial intelligence and hopes for a Fed rate cut while Dow Jones declined due to stock specific cues.
- FTSE index ended higher on Friday buoyed by gains in banking and mining stocks.
- Strait Times Index closed higher on Friday, replicating the rally in US stocks overnight.
- Nikkei Index closed higher on Friday, led by gains in technology stocks even as investors braced for the election to select the prime minister, which will set the tone for budget and central bank policies.
- Hang Seng Index closed lower on Friday, due to a fall in technology stocks amid rising geopolitical tensions.
- At 8.30 AM, Asian Markets were mostly trading mixed.

## Indian Debt

- The interbank call money rate ended higher at 5.45% on Friday compared to 5.00% on Wednesday.
- Government bond prices were marginally higher on Friday as investors sold the note after the issue of the new 10-year bond.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.51% on Friday compared to 6.52% on Wednesday.

## Capital Market

- Eldeco Infrastructure and Properties Ltd has filed preliminary papers with capital markets regulator Sebi to raise Rs 1,000 crore through an initial public offering (IPO)
- Capri Global Capital announced a public issue of non-convertible debentures (NCDs) worth up to Rs 400 crore, including a Rs 200-crore greenshoe option.
- Steel Exchange India secured a Rs 350 crore refinancing facility from a consortium of financial institutions.
- BVG India files IPO papers with Sebi, aims to raise Rs 300 cr via fresh issue.
- Truhome Finance to receive an additional Rs 500 crore capital infusion from its largest shareholder.

## Regulatory

- The Reserve Bank of India (RBI) plans to introduce scale-based thresholds beyond which regulated entities (REs) such as banks and non-banking financial companies (NBFCs) will need board approval for lending to related parties.
- The Reserve Bank of India (RBI) has proposed major changes to the framework for external commercial borrowings (ECBs), linking borrowing limits to the financial strength of companies and allowing funds to be raised at market-determined interest rates.
- RBI data showed States and Union Territories plan to borrow up to Rs 2.81 trillion through state government securities in the third quarter of the current financial year.
- The Reserve Bank of India (RBI) granted self-regulatory organisation (SRO) status to the Finance Industry Development Council (FIDC).

## Economy and Government

- India's foreign exchange (forex) reserves fell by \$2.3 billion to \$700.23 billion in the week ended September 26.

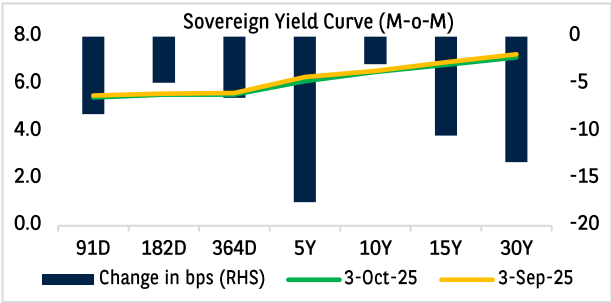
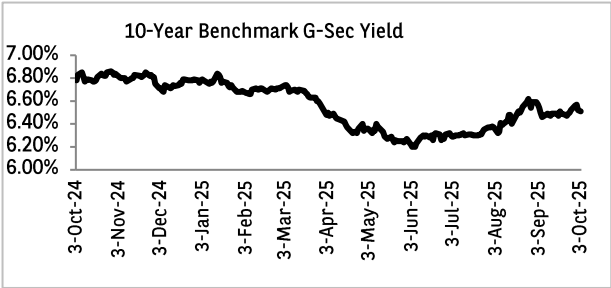
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2026	8,00,000	8,00,000	0

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.55	6.46	7.17	7.21	8.44	8.97
1-Yr	5.59	6.67	7.38	7.42	8.65	9.18
3-Yr	5.81	6.91	7.62	7.66	8.89	9.42
5-Yr	6.11	6.95	7.76	7.79	9.03	9.56
10-Yr	6.51	7.19	8.00	8.03	9.27	9.80

G-sec and corporate bonds data as of Oct 3

\* Weighted average yields; Source: CRISIL



Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	2.07% (Aug-25)	2.82% (May-25)	3.65% (Aug-24)
IIP	4.0% (Aug'25)	1.9% (May'25)	0.0% (Aug'24)
GDP	7.8% (Apr-Jun FY25)	7.4% (Jan-Mar FY25)	6.5% (Apr-Jun FY24)
GST Collection (in Rs cr)	1,86,315 (Aug-25)	2,01,050 (May-25)	1,74,962 (Aug-24)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Oct 3	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	64.53	64.11	68.82	77.62
NYMEX Crude Oil (\$/bbl)	60.88	60.48	67	73.71
Gold (Rs / 10 gm)#	116954	117332	97337	75615

# ibjarates spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	Oct 3	Oct 1
USD	88.78	88.68
GBP	119.32	119.49
Euro	104.08	104.36
100 Yen	60.16	60.23
Forex Reserve (\$ bn)*	700.24	702.57
Dollar Index	97.72	97.85

\*Data pertains to Sep 26 and to Sep 19 respectively

Source: RBI, Financial Websites

International

- US ISM Services PMI eased to 50.0 in September of 2025 compared to 52.0 in August 2025.
- US S&P Global Services PMI eased to 54.2 in September of 2025 compared to 54.5 in August 2025 and US S&P Global Composite PMI eased to 53.9 in September of 2025 compared to 54.6 in August 2025.
- Eurozone HCOB Services rose to 51.3 in September 2025, compared to 50.5 in August 2025 and Eurozone HCOB Composite PMI rose to 51.2 in September 2025, compared to 51.0 in August 2025.
- Eurozone PPI fell to -0.6% in August of 2025 compared to 0.2% in July 2025.
- UK S&P Global Services PMI eased to 50.8 in September of 2025 compared to 54.2 in August 2025 and US S&P Global Composite PMI eased to 50.1 in September of 2025 compared to 53.5 in August 2025.

Commodities

- Crude oil prices rose by 40 cents to \$60.88 a barrel on the NYMEX amid weakness in the dollar index.

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